

BUSINESS OVERVIEW WORKSHEET | 60 MINUTES 🕹

Identifying who you are as a business, what your philosophies are, and what drives your guiding principals; will enable you to refine and connect the dots when doing additional areas of assessment.

IP: Don't forget to encapsulate your history, le	ocation, staff experti	ise, achievements, e	tc. – don't get too long	winded.
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VALUES AND GUIDING PRINCIPALSWORKSHEET | **40 MINUTES** 🕸

This page drives or contributes to many areas of your business outreach.

Guiding Principals, what business must always be (self-evident & objective). These will never change overtime, no matter what. They are the backbone of what makes the business tick. Principles govern how the business behaves and interact in various situations, often with a firm and consistent stance. Share these with your staff and ensure they are followed.

How do these get used? Principles are often a reference point in determining goals and values, while also helping to outline a staff/business mantra that does not change. Limit to 15.

 ${\it Example:}\ Forward\ thinking, industry\ leading,\ unsurpassed\ expertise,\ full\ transparency.$



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		opinions change as they relate to ideas or issues. These may dustry and may change as the environment demands, or needs
lo these get used? Values are o	often the mantra that is used whe	en looking at all key contact methods with customers.
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		ss of the issue they present being fully transparent. Note "fully at the unyielding need to please all customers may change based d keep going!
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SWOT BUSINESS ASSESSMENT WORKSHEET | 5 MINUTES &

This exercise offers great insight into what is working and what is not. After these have been identified, explore the positive section of the SWOT analysis (Strength and Opportunities) to gain a comprehensive snapshot what you do well, and the potential for growth side (Opportunity and Weaknesses) for changes you can make. This will help to feed into the main key words to see if they need adjustment or if they still ring true. We will use these to work on forming a strategy to action plan in the next sessions.

List	your businesses/organizations keywords completed in the previous activity.
Defi	ine an objective for how you will look at the SWOT.
	at do you want to get out of this exercise? Select all that apply and remember these when you are wor ough the SWOT sections. you can refer back to these if you get stuck.
[☐ A better understanding of the whole your business
[☐ Understanding what you do well so you can focus on those traits in marketing initiatives
[☐ Defining opportunities for your business to change/grow/adjust
[Realizing threats and how you can modulate a revised way of looking at this
[☐ How does a consumer perceive your business
[Identifying what your customers maybe don't know about you
	Other:
Unc	Herstanding how SWOT analysis works.
•	Strengths – Internal company competencies or attributes which are successful for your business
V	Weaknesses – Internal obstacles that impede business from being as successful as possible
	Opportunities – External opportunities or trends that can be integrated into your business
	Threats – External challenges that can/do jeopardize current or future success for your business
Afte	er SWOT, does your businesses/organizations keywords listed above still represent you (see example belo
	:▶ YES - Great work!▶ NO - That's okay this is an opportunity to refine!

Take a look at the S O part of your SWOT ans see if maybe another theme emerges. Then, go back and review your keyword worksheet and select another word you had that best sums up that theme.

STRENGTHS, WEAKNESS, OPPORTUNITIES, THREATS WORKSHEET | 60 MINUTES &

Complete the **exercise to** define what those words are for your business. INTERNAL STRENC INTERNAL WEAKNESSES EXTERNAL OPPORTUNITIES

KEYWORD BRAINSTORMWORKSHEET | **60 MINUTES** •

Key words are free based associations that allow us to define three distinct words that we can begin to work into communications. These three words, when used properly help to embed a brand into the unconscious human brain by ways of a retrieval set. It has been studied that when brands interact with people, they taking away words associated through messaging or visuals. They then classify three emotive words by the relevance they feel to their own life. Let's discuss what this looks like, and the importance of consistent key messages across multiple organizations.

A List words to encapsulate what your business is, in this word association exercise?



Need help? Like individuals, traits given to brands draw people in. Words with emotive human personality traits allows the audience to easily identify and retain key words. Drawing a blank? Think of your business as a person, what they would sound like (happy, confident, pleasant), and think about how they would act (friendly, authentic). Traits such as these given to brands help viewers to identify and classify a brand.

KEYWORD REFINEMENT WORKSHEET | 40 MINUTES ©

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C		e (3) key w	ords, be ab	osolutely sure	e these are	the b	est fit to	describe	e you
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These three words, plus your association word will drive your positioning statement and help you to focus your business efforts when identifying which of these words appeal most to your individual target markets.

POSITIONING STATEMENT WORKSHEET | 120 MINUTES &

You have developed your key words, but what does that mean for your businesses? How do we make it applicable to your tone and how do we make sure these words are integrated into a consistent message leading your marketing? Remember this is customer facing meaning customers read and relate to this.

SUCCESS TIPS

Try writing your statement and fitting in the key words

Write multiple versions

Make sure it is short, succinct, and relevant

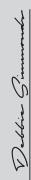
Write your busir	nesses/organizatio	ons communication	n keywords (genera	alize for ease of exercise	e)
] [
	messages to get a fev ake sure you are using			those three key words	. Remem
Write the messag	ge that works the bes	t. This is your positi d	oning statement o	r elevator pitch.	
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CERTIFICATE OF COMPLETION PIVOT MODULE 1: BUSINESS BASE

This certificate is to congratulate you on your on-going efforts to better your business!

for your contribution as a participant in the CBIA's e-learning series PIVOT. Work that has been completed takes an estimated 7 hours to do. Congrats and we wish you the best of luck.



Debbie Simmonds - President



Krystal Adams - Executive Director